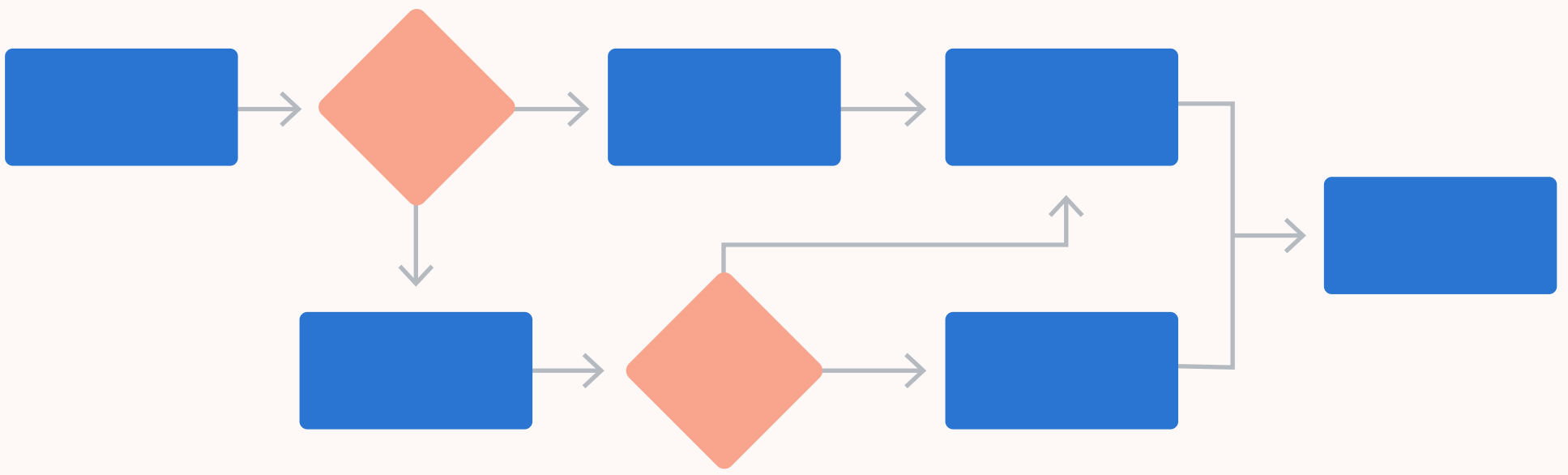


Workflow Design Starter Kit

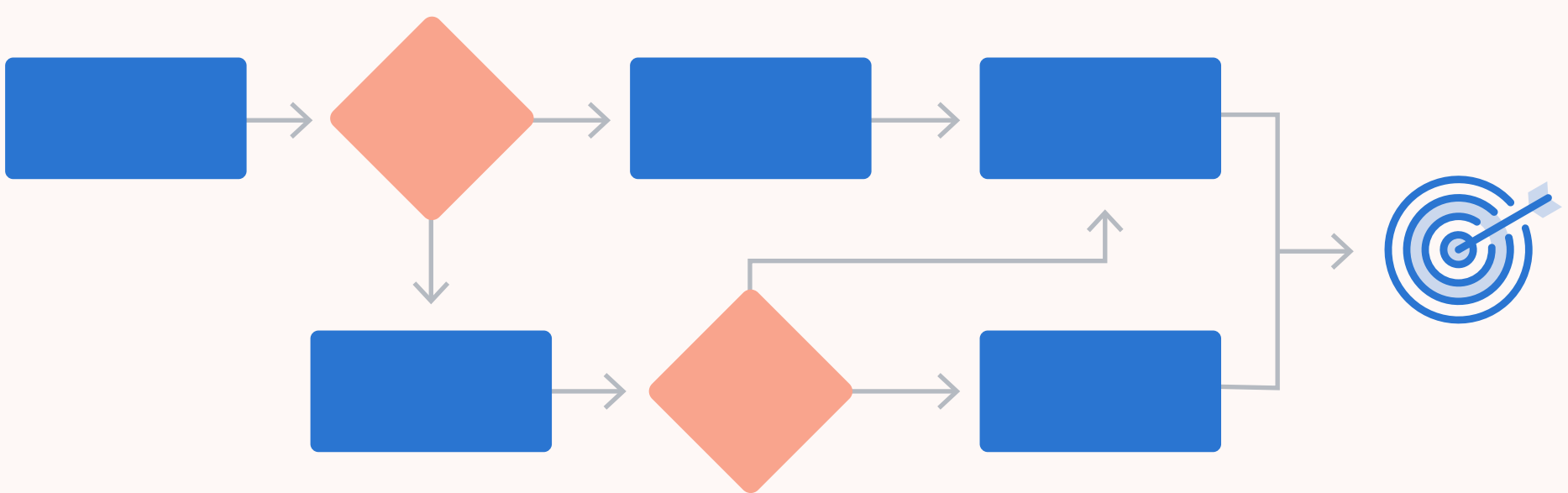
To help you design the most effective workflow, we've put together a starter kit that helps you identify all the necessary components of a workflow and plot them out within a process.

Pre-Design: Understand your process and goals

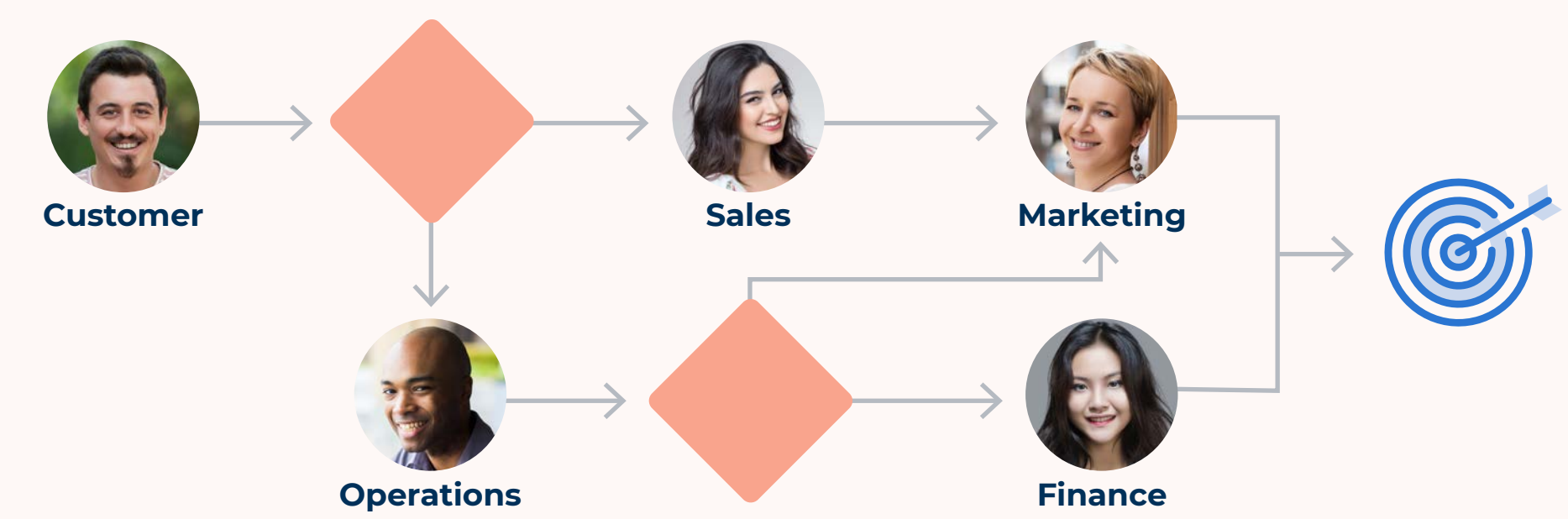
- 1 Process:** Determine your process, or the series of actions or steps that are taken in order to achieve a particular end goal.



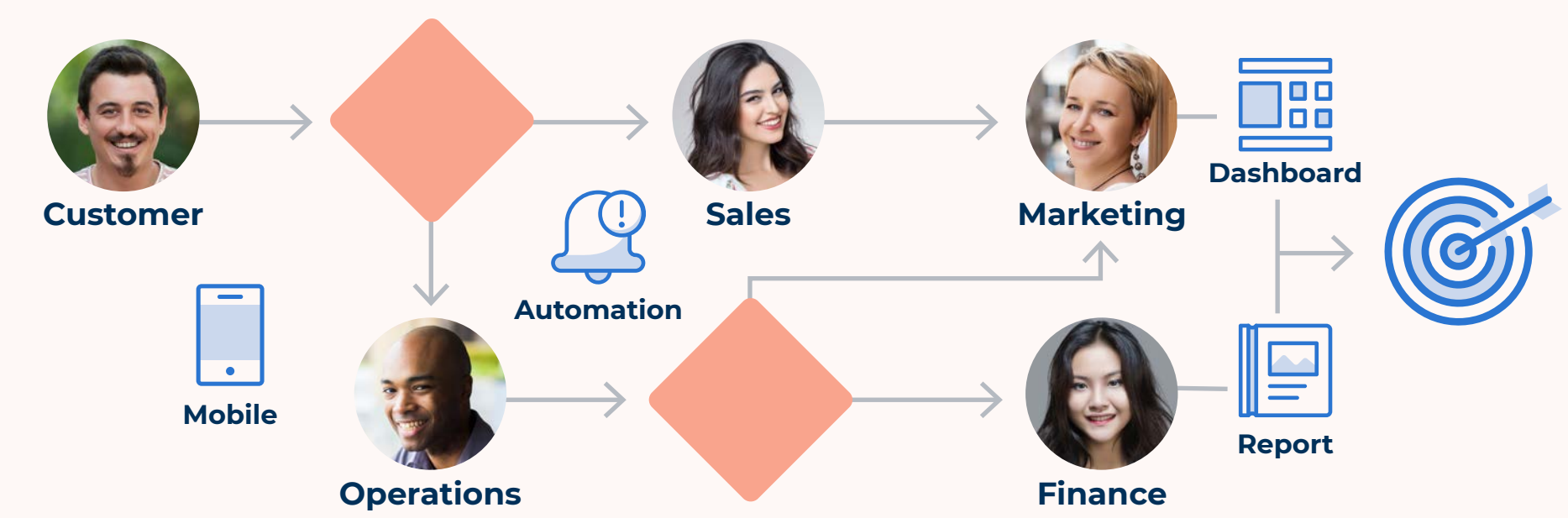
- 2 Goals:** Identify the result or achievement toward which your process effort is directed.



- 3 Roles:** A function or part performed in a particular operation or process.



- 4 Visibility:** A clear and unobstructed view of the operation or process.



Design: Identify your workflow building blocks

- 1 Sheet:** This is the "home base" where all of your data is stored.
- 2 Forms:** Forms can be used to collect data and information from anyone and can be sent via email, hyperlinks, and even published to a website.
- 3 Sheet Summary:** This refers to the rollup of key information from your original sheet, which help to display key metrics and data points on a dashboard.
- 4 Content Collaboration:** Manage and review approval processes for all assets directly within the process to streamline review rounds and respond to feedback quickly.
- 5 Reports:** Pull data from multiple different sources to create high-level reports that answer key business questions.
- 6 Automation:** Use automation within your processes to simplify your workflow and streamline repetitive, manual tasks, like review requests, update requests, and status updates.
- 7 Dashboards:** Build dashboards to surface key metrics across a program or process without exposing underlying data, and use it as a central source of truth that team members and stakeholders can reference.

Example Workflows

- 1 Project tracking workflow:** This workflow helps you streamline the way you track and manage your projects. Start by creating a project plan sheet for each project that you can then roll up into either a milestone report or an at-risk task report, depending on project status. Then, surface those key metrics into a high-level dashboard to gain visibility into all project-related items.
- 2 Request management workflow:** This workflow helps capture and act on requests quickly and effectively. Create a form that requesters can fill out that will then filter into a tracker sheet. Then, build a report to surface all request-related information that then rolls up into a dashboard for increased visibility into all requests that come in and their status.
- 3 Meeting management workflow:** To hold better, more efficient meetings, use this workflow to build an end-to-end task sequence. Start with a form where people can submit agendas that then feed into an agenda sheet. Then, create two separate reports; one for future agenda topics and one for past agenda topics. Surface all future and past agendas into a portal that allows all team members to see what's been discussed already and what's coming down the line.